

Needs Analysis

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Strategic Asset Allocation

Manager Selection

Tactical Asset Allocation

Portfolio Construction

Monitoring

Rebalancing

Monthly Reporting

- Managing a portfolio which reflects a client's objectives and tolerances necessitate that we gain an in-depth understanding of their requirements.
- We engage in an analytical process which aims to assess their willingness to assume risk and their expected return objectives. We combine this with their ability to assume risk, in terms of portfolio consumption and life stage, to arrive at best fit portfolio solution.
- The objective of the needs analysis stage is to quantify and define the following constraints / objectives
 - Return objective
 - Risk constraints
 - Liquidity constraints
 - Time horizon
 - Family structure
 - Investment structure
 - Personal investment philosophy